Dr O'Callaghan Inc. operating as Dr O'Callaghan Dental Care
MARKETING & TECHNICAL SUPPORT GUIDELINES
for Administrative and Reception Roles
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Dr. O'Callaghan
Dental Care

Marketing & Technical Support Guidelines

For Dr O'Callaghan Dental Care

This document serves as the single source of truth for all brand and technical-related materials. Please adhere to these guidelines to maintain a consistent and professional image.

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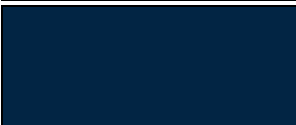
MARKETING DESIGN GUIDELINES

1. Fonts

To ensure consistency across all print and digital materials, please use only the following fonts.

- **Main Font (Headings, Body Copy): Poppins**

  - **Usage:** Website, presentations, brochures, flyers, internal documents.

- Sub Font (Formal Headings, Luxury Accent): Bodoni 72

  - Usage: Formal certificates, special event invitations, high-end marketing collateral. Use sparingly for accent purposes only.

  - Weights: **Bold** is preferred for titles.

2. Colour Palette

Our colour palette is designed to evoke trust, cleanliness, and professionalism. Always use the provided HEX codes for digital design and the equivalent CMYK/Pantone values for print.

Colour Name	HEX Code (as on website)	Visual	CMYK Value & Pantone
Main Navy Blue	#022544		**Request from designer**
Main Teal	#749B93		**Request from designer**
Dental Red	#DD3325		**Request from designer**
Washed White	#E2E3D8		**Request from designer**

3. Logos

Your logo is your signature. It must never be altered, stretched, or recoloured unless using the pre-approved versions below.

- **Primary Logo (Full Colour):**

  - **Usage:** Standard use on websites, brochures, signage.

- **Icon:**
  - **Usage:** Browser tab (favicon), social media profile pictures, mobile app icon or profile pictures.

- **Secondary Logo (Icon with text underneath):**
  - **Usage:** Where horizontal space is limited (e.g., email signatures, mobile website, small promotional items and similar).

Clear Space & Minimum Size:

- **Clear Space:** A minimum area of 5 pixels must surround the logo on all sides. Nothing should encroach on this space.

4. Email Templates and Usage

All external communication must reflect our brand's professionalism.

- **Outlook Signature Template:**
  - See folder of Email Templates
  - Usage:
    - Double click the template and choose Outlook if prompted, then replace all [text between brackets] or {these brackets} and remember to attach the appropriate documents if necessary.
    - Review the "Sent from" and " Sent to" options before sending.
    - Remove unnecessary attachments (if the website logos attach themselves to the template when you opened it, remove them as attachments). Unnecessary attachments take up more space on the server and will cost more to maintain

- **Marketing Email Template:**
  - Could be requested from the Administrator.
  - **Guidelines:**
    - Use Poppins font.
    - Use the Dental Red (#DD3325) for primary call-to-action buttons or hover actions.
    - Keep background colours light, primarily using Washed White (#E2E3D8) or Main Navy (#022544) for a bolder look,

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TECHNICAL SUPPORT GUIDELINES

1. Email Setup & Management

Our primary communication platform is **Microsoft Outlook**.

- **Setup Instructions (for new employees):**

  1. Your IT administrator will provide you with your email address: [admin@drhenryocal.co.za].

  2. Open Microsoft Outlook. It will typically auto-detect settings. If not, use the following:

     - **Account Type:** Microsoft 365 / Exchange Online

     - **Username:** Your full email address.

     - **Password:** The temporary password provided by IT or set by the director.

  3. **Multi-Factor Authentication (MFA) is NOT REQUIRED yet.** This feature may be activated by IT in the future as necessary.

- **Password Management Policy:**

  o **Strength:** Passwords must be a minimum of 8 characters and include uppercase letters, lowercase letters, numbers, and a symbol.

  o **Sharing:** Passwords must **never** be shared with anyone, including colleagues.

  o **Change Frequency:** Passwords must be changed every [90] days.

  o **Password Manager:** We recommend using the built-in **Microsoft Edge/Chrome password manager**

2. Managing Email Storage (Deleting Emails)

To ensure optimal performance and avoid exceeding mailbox quotas, please manage your inbox regularly.

- **Quota Limit:** Your mailbox has a size limit. You will be notified just before you reach it.

- **What to Delete/Archive:**

  o **Delete:** Newsletters, spam, old notifications, and emails with large attachments that have already been saved to the server (see below).

- o **Alternative to deleting:** Download important emails to your computer, and delete the email after its been downloaded and saved in an appropriate folder.

- o **Archive (Using Outlook's Auto-Archive feature):** Older emails that are not needed for daily work but must be kept for compliance ([e.g., emails older than 2 years]).

- **Saving Attachments:** To save space, do not use your inbox as a file storage system.

  1. Save important attachments to the appropriate network drive/local drive: [e.g., Z:\Patient_Files\ or X:\Marketing\ ].

  2. Once saved, you can delete the email or remove the attachment via Outlook's **File > Info > Cleanup Tools > Mailbox Cleanup** tool.

3. IT Support Protocol

If you encounter any technical issues, please follow this protocol to ensure a quick resolution.

1. **Step 1: Basic Troubleshooting:** Restart your computer. This solves many common issues.

2. **Step 2: Send an Email:** If the issue persists, submit a support email to the IT provider.

   - o **IT Provider:** Ulrich Lategan

   - o **Support Email:** Dedicated Support: web@drhenryocal.co.za or General Support: info@ulilategan.co.za

   - o **Emergency Phone:** 079 799 9154

3. **Step 3: Provide Details:** In your email, please include:

   - o Your name and contact number.

   - o A clear description of the problem and any error messages or screenshots.

     1. Please use the Prt Sc or Snipping Tool for screenshots (search Snipping Tool in Windows to find)

   - o When the issue started and how it was found.

   - o The steps you've already tried.

DEFINITIONS & KEY TERMS

This section explains the technical, design, and role-specific terminology used throughout the Design & Technical Support Guidelines. Please refer to this glossary if you are unsure of any term's meaning.

A – D

- **Administrator (Ulrich Lategan):** The individual responsible for the overall management, configuration, and technical support of the practice's digital systems. This includes user accounts (website, emails, passwords, google business), software setup, network drives, and liaising with the IT provider. The Administrator is a key contact for website, marketing, technical guidelines and access requests.

- **Archive (Email):** The process of moving emails out of your main inbox folder into a separate storage folder to reduce clutter. Archived emails are not deleted and can still be searched for and found later. In Outlook, this can be done automatically using the "Auto-Archive" feature.

- **Body Copy:** The main written content of a document, webpage, or email. It is distinct from headings, logos, and titles. (e.g., the paragraphs of text in a brochure).

- **Brand/Branding:** The combined image and identity of Dr O'Callaghan Dental Care. It includes our logo, colours, fonts, tone of voice, and overall perception we create for our patients.

- **CMYK:** A colour model used for **print** design. It stands for Cyan, Magenta, Yellow, and Key (Black). Printers mix these four inks to create all other colours. When preparing materials for a physical printer (like for brochures or flyers), you must provide CMYK values.

- **Clear Space:** The mandatory empty area that must surround our logo on all sides. This ensures the logo is never crowded by other text or graphics, maintaining its visibility and impact. Our guideline specifies a minimum of **5 pixels** of clear space.

- **Compliance:** The act of following rules and regulations. In the context of email, it refers to legally required retention periods for certain types of communication.

- **Designer (External Brand Consultant: Nathan Fallis):** The external professional contracted to create the foundational visual identity of the practice. This includes the conceptualization and design of the logo suite, the selection of the brand colour palette (with HEX codes),

and the curation of the brand typefaces (Poppins and Bodoni 72). Once the brand identity is delivered, the Marketing Manager is responsible for maintaining and applying these assets according to the guidelines, while the Designer may be consulted for future large-scale projects or brand refreshes.

E – H

- **Favicon:** A tiny, iconic image (usually 16x16 or 32x32 pixels) that appears in the browser tab next to the page title, and in bookmarks bars. It is typically a simplified version of the company logo.

- **Font:** A specific set of letters, numbers, and symbols that share a common design style (e.g., Poppins, Bodoni 72).

- **HEX Code:** A six-digit code preceded by a hash (#) that is used to specify colours in **digital** design (websites, apps, on-screen graphics). (e.g., #022544 is our Main Navy Blue).

I – P

- **Icon (Logo):** A simplified, graphic symbol that represents our brand without using the full business name. It is often used in small spaces like social media profile pictures or app icons.

- **Logo:** A graphic mark or emblem used to identify our practice. It is the visual cornerstone of our brand and must be used consistently as per the guidelines.

- **Marketing Manager (Liam O'Callaghan):** The individual responsible for overseeing and protecting the practice's brand identity. This includes the creation and approval of marketing materials (brochures, emails, social media), ensuring all designs adhere to the brand guidelines (correct fonts, colours, logo usage), and managing the public image of the practice. The Marketing Manager is the primary contact for design-related questions.

- **MFA (Multi-Factor Authentication):** A security method that requires a user to provide two or more verification factors to gain access to an account. For example, something you know (a password) and something you have (a code sent to your phone). This is **not currently required** but may be implemented in the future.

- **Outlook:** Our primary **mail client**—the software application (Microsoft Outlook) that we use to send, receive, and manage our emails.

- **Pantone (PMS):** A standardized colour matching system used primarily in printing. Pantone colours ensure exact colour consistency across different

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materials and printers. "Request from designer" means the exact Pantone code will be provided for specific print jobs.

- **Password Manager:** A software application (like the one built into Microsoft Edge or Chrome) that stores and manages your passwords for different websites and services in a secure, encrypted vault. This is recommended to help create strong, unique passwords.

- **Primary Logo:** The main, preferred version of our logo, used in most situations like websites, brochures, and signage.

- **Prt Sc (Print Screen):** A key on your keyboard that takes a screenshot of your entire screen. The image is copied to your clipboard and can be pasted (Ctrl+V) into an email or document.

Q - Z

- **Quota (Mailbox Quota):** The maximum amount of storage space allocated to your email account. If you exceed this limit, you may be unable to send or receive new emails. You will be notified before you reach it.

- **Secondary Logo:** An alternative version of our logo, typically arranged with the icon above the text. It is used where horizontal space is limited, such as in email signatures.

- **Snipping Tool:** A built-in application in Windows that allows you to take custom screenshots of a specific area of your screen, a window, or the entire screen. It is more flexible than the Prt Sc key.

- **SVG (Scalable Vector Graphic):** A type of image file format that uses mathematical equations to render graphics. Unlike JPEGs or PNGs, SVGs can be scaled to any size without losing quality. This is the ideal format for logos.

- **Troubleshooting:** The systematic process of diagnosing and solving a problem. The first step is always to **restart your computer**, as this resolves many common software glitches.

~ ENDS ~

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For any questions regarding these guidelines, please contact: Google/IT Manager & Administrator: Ulrich Lategan or Marketing Manager: Liam O'Callaghan

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